

THE HAMPTON ROADS PLAYBOOK

EXECUTIVE SUMMARY • OCTOBER 2025

HAMPTON ROADS
ALLIANCE

STRENGTHS DEFINED
STRATEGIES ALIGNED

THE HAMPTON ROADS PLAYBOOK IS A CALL TO ACTION—UNITING OUR STRENGTHS TO LEAD THE NEXT ERA OF AMERICAN GROWTH & INNOVATION. TOGETHER, WE ARE PUTTING OUR REGION ON OFFENSE.





Contents

Introduction	4
The Hampton Roads Advantage	6
DEAL Framework	10
Transformative Projects	14
Next Steps	18

Introduction

Hampton Roads, Virginia is on the precipice of something big.

Our region is rich with assets that few others can match: world-class port facilities, an unparalleled defense presence, a growing energy sector, and a legacy of innovation that sent a man to the moon and allows us all to reach for the stars. Team Hampton Roads has been ready for the big leagues, and our turn has arrived.

For much of the 21st century, Hampton Roads has watched from the sidelines while other regions put points on the board. In the early 2000s, a surge in defense spending following 9/11 gave our economy a temporary lift, but the global recession of 2008 halted that momentum. Old Dominion University's State of the Region called the 2010s "a lost decade" as sequestration and lingering effects from the recession left Hampton Roads stuck on the bench while other regions ran up the score. Then came COVID-19 and a pandemic-induced recession, raising fears of yet another lost decade.

But out of those challenges **a new economic order has emerged, an order that plays directly to our strengths.** Bruce Katz, the renowned urban economic strategist from Drexel University, has described the post-pandemic American economy as one "driven by national security concerns, sensitive technologies, critical minerals, a redrawing of domestic and global supply chains, and, remarkably, a reshoring of advanced production." Hampton Roads is uniquely positioned to lead this transformation.

Thanks in part to funding from the GO Virginia program, the Alliance and our partners sought to develop a strategy to reflect this reality and how we can win.

The Hampton Roads Playbook is **a shared regional plan that highlights our collective assets and outlines a strategy for success.** It's a guide that enables us to make the right moves, send the right players onto the field, and leverage our strengths to score points. We are aligning behind the four sectors that form the foundation of our regional economy: **Defense, Energy, Aerospace, and Logistics (DEAL).**

These are not new pursuits; they are the pillars that have long sustained Hampton Roads. Defense and logistics are core historic pillars, and the rapid growth of energy production and aerospace creates remarkable opportunities for the region. What is new, however, is our deliberate focus on deepening and accelerating growth in these sectors. In doing so, we are diversifying within our strengths, not away from them, expanding the impact of what already defines us. Growth in these sectors will also ripple outward, strengthening every corner of our economy, from construction and architecture to finance, insurance, higher education, retail, tourism, and healthcare.

The DEAL Framework also utilizes four cross-cutting drivers—Workforce, Innovation, Infrastructure, and Supply Chain—to clarify our next plays: **transformative projects that build on our advantages to drive investment and create jobs.**

Eight such projects have already emerged, but the Playbook is designed for the long game. Beyond the first



set of initiatives, we've outlined a framework for creating future projects and stand ready to work with regional stakeholders to shape what comes next. Take a look and see how you, your community, your organization, and our region can help score points and emerge victorious.

The Hampton Roads Alliance is proud to serve as the region's convener and catalyst, bringing together public and private partners to put this Playbook into action. In partnership with the Hampton Roads Workforce Council and working alongside our regional partners, localities and private investors, **we are committed to aligning behind one unifying economic strategy.** Together, we are moving from chasing companies to cultivating ecosystems, building the conditions where businesses thrive, talent grows, and opportunity multiplies.

Success will require every one of us leveraging our strengths for the good of the team, guided by a shared roadmap for growth. Now is the time to put on your Team Hampton Roads jersey, step onto the field, and play to win.

This is our moment — let's seize it.

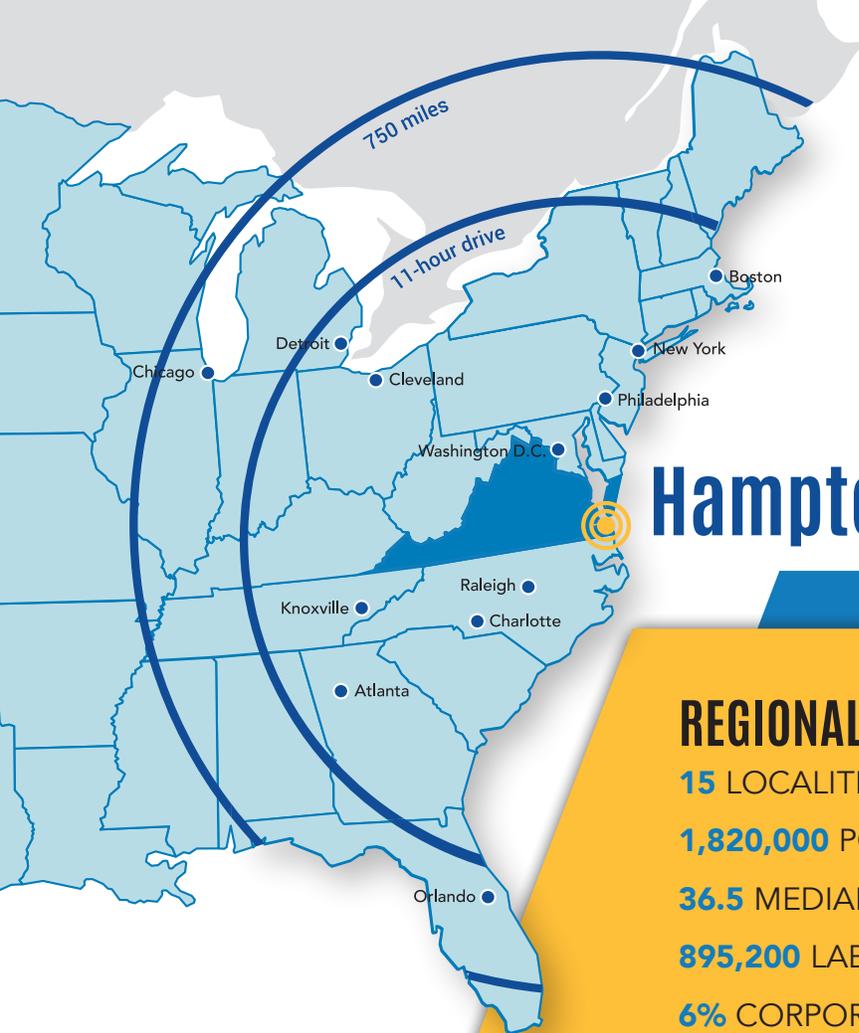
Douglas L. Smith

Douglas L. Smith
President & CEO
Hampton Roads Alliance





THE HAMPTON ROADS ADVANTAGE



Hampton Roads, Virginia

REGIONAL PROFILE

15 LOCALITIES

1,820,000 POPULATION

36.5 MEDIAN AGE

895,200 LABOR FORCE

6% CORPORATE INCOME TAX RATE

A CONSTELLATION OF CATALYTIC ASSETS

The 37th most populous region in the United States, Hampton Roads is America's largest polycentric metropolis. Comprised of 15 dynamic communities, each of which houses an impressive array of assets, Hampton Roads is home to a constellation of innovation rather than the hub and spoke model of most of America's metropolitan areas. Located midway between Maine and Florida, the region's central location also provides access to 47% of the U.S. population—more than 130 million consumers—within a day's drive.

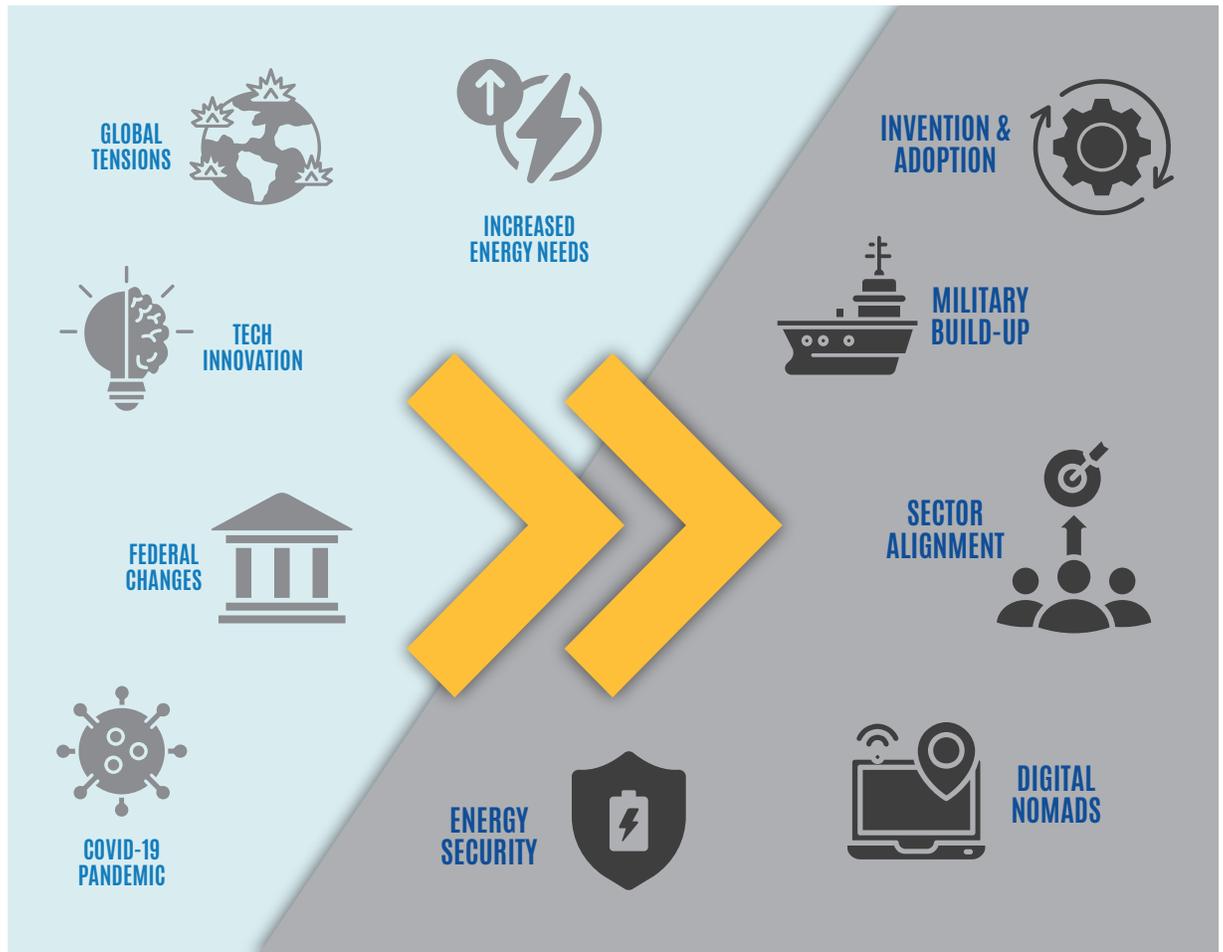
THE SAME HARBOR THAT WELCOMED AMERICA'S EARLIEST SETTLERS IS NOW HOME TO:

- The world's largest naval base
- 25% of America's shipbuilding and repair capacity
- 19 military installations
- The highest concentration of active-duty military personnel outside of the Pentagon
- NATO's North American headquarters
- Two Federal Research Labs: Jefferson Lab & NASA Langley Research Center
- The deepest, widest and fastest-growing port on the East Coast
- 33 colleges and universities
- 3 *Fortune 500* company headquarters
- Nearly 200 international companies

For more than 400 years, Hampton Roads has capitalized on these assets, anchoring national defense, powering global trade, and now fueling the growth of clean energy and advanced technology.

Disruptive Forces Shifting the Global Economy

For much of the 21st century, Hampton Roads experienced relatively slow economic growth. While several of its municipalities were among the fastest growing in the Commonwealth, outside events and forces prevented the region from reaching its true potential. In its State of the Region report, Old Dominion University stated that the region was “largely left behind” in the decade from 2010 to 2019. The year 2020 served as a watershed moment, however, as the COVID-19 pandemic and rising global tensions began to reshape the global economy.



FIVE YEARS LATER, IT IS EVIDENT THAT THE NEW ECONOMY IS CONVERGING AROUND THREE IMPERATIVES:

Remilitarize:

The U.S. is undergoing its largest defense modernization since the Cold War, with appropriations exceeding \$850 billion. Submarines, carriers, advanced munitions, and cyber are at the forefront.

Reshore:

Strategic industries, from semiconductors to critical minerals, are moving closer to home as companies prioritize resilience and trusted supply chains.

Re-energize:

The exponential rise in energy demand is driving massive investment into energy innovation. Regions must invest in diverse energy sources to meet tomorrow's demands.

MEETING THE MOMENT

Urban economic strategist and co-founder of New Localism Associates, Bruce Katz describes this shift as a rare moment in history when the global order is being fundamentally reshaped. He asserts that metropolitan areas with four key characteristics are poised to dominate the future of the U.S. economy. Hampton Roads has all four.

MILITARY METRO

Largest per capita DoD spend in America

More than \$15 billion in federal contracts and grants allocated to the region annually, 90% from the Department of Defense

TRADING POWERHOUSE

25% year-over-year growth

Home to the Port of Virginia, the fastest-growing port in America, moving more than 3.2 million TEUs annually with the highest on-dock rail share in the nation

CLEAN ENERGY FIRST MOVER

Largest offshore wind project in America

Dominion Energy invested \$10 billion into the Coastal Virginia Offshore Wind (CVOW), a 2.6-gigawatt project that will provide power to 650,000 customers

TECHNOLOGY HUB

A worldwide leader in advanced computing

Jefferson Lab will host a High Performance Data Facility (HPDF) to accelerate scientific discovery in an era of exascale supercomputing

Hampton Roads stands at the center of today's economic shift toward security, resiliency, and sustainability. The region's competitive position comes from five things that set us apart:

- Scale and predictability of demand in defense, energy, and trade that provide steady, long-term opportunities.
- Dual-use innovation where ideas move from military to civilian markets and back again.
- Strategic location and connectivity with access to half the U.S. population and more than 200 countries.
- A renewable talent pipeline as 15,000 service members and 25,000 college graduates enter the workforce every year.
- A deep bench of primes, labs, and emerging firms that give businesses ready-made partners and networks.

These strengths make Hampton Roads a place where companies can compete and win, not only today but for decades to come.



THE DEAL FRAMEWORK

DEFENSE • ENERGY • AEROSPACE • LOGISTICS

In today's world of remilitarizing, reshoring, and re-energizing, Hampton Roads is uniquely positioned to lead.

The Alliance partnered with Bruce Katz's New Localism Associates to provide a detailed diagnostic on the regional economy and develop a strategy for accelerated growth. Katz helped map the region's core assets onto the economic opportunities that await metro areas and, in doing so, provided Hampton Roads with the impetus needed to create a Playbook for success.

This Playbook aligns Hampton Roads' strengths with global opportunities. It identifies the industries where our region has clear competitive advantages, outlines transformative projects that can unlock growth, and provides a framework for future initiatives. The goal is straightforward: position Hampton Roads as a national and global leader in innovation, production, and resilience by focusing on what we do better than anywhere else.

Katz noted that federal spending is an area of differentiation for Hampton Roads, with a particular strength in shipbuilding and repair and military equipment and supplies. Huntington Ingalls Industries (HII), headquartered in Newport News, receives large defense contracts to build America's nuclear-powered aircraft carriers and submarines. Rising global tensions are driving an unprecedented expansion in defense capabilities, making HII and other major contractors essential to both national security and Hampton Roads' economic strength.

Through his diagnostics and interviews with dozens of local leaders, Katz also noted dynamic movement in the energy, aerospace, and logistics industries. Dominion's CVOW project cements Hampton Roads as a leading hub for resilient energy and attracts a diverse supply chain. Companies like LS GreenLink are already investing in the region, advancing dual-use technologies and statewide energy goals. NASA Langley put Hampton Roads on the map as an early leader in the race for space, and the region continues to attract cutting-edge companies focused on aviation, advanced air mobility, and uncrewed systems. The region has long dominated the logistics space thanks to the Port of Virginia, and advancements in that sector should mean additional investment for Hampton Roads.

The region has historically played a larger role downstream in the value chain, focusing on assembly rather than research & development. The current global context intertwines manufacturing and innovation, however, creating an opportunity for Hampton Roads.



Four Engines of Growth

Through analysis, engagement, and consensus-building, the Playbook identifies four sectors that should anchor the region's economic future. We call this the **DEAL Framework**—Defense, Energy, Aerospace, and Logistics. Think of this as our game plan. Each sector matters on its own, but the real advantage comes from how they work together.



Defense anchors the Hampton Roads economy, with over \$15 billion in annual DoD contracts, the highest DoD spend per capita spend, Newport News Shipbuilding, NATO's North American headquarters, and 19 military installations. As remarkable as those strengths are, defense also powers the other sectors. Shipyard skills are now used to build offshore wind towers. Defense research in autonomy shows up in aerospace and logistics. Military demand for energy security creates new solutions for the civilian grid.



Energy supply and security are national imperatives and Hampton Roads is perfectly positioned to provide the modern energy solutions. Dominion's 2.6 Gigawatt CVOW project, investments by Virginia Natural Gas, and the Department of Energy's Jefferson Lab create a long-term pipeline of projects. Offshore wind infrastructure is already staged at Portsmouth Marine Terminal and Fairwinds Landing and the region already claims an advanced nuclear ecosystem. Paired with expansive industrial capacity that supports the defense industry, Hampton Roads is a rising leader in reliable, affordable clean energy supply and innovation.



Aerospace combines federal labs, commercial innovators, and defense applications within a 90-mile corridor that can design, build, and launch. NASA Langley, Wallops Flight Facility, and our airports anchor this work, while companies like Rocket Lab, DroneUp, and Advanced Aircraft Company prove the region can scale new industries and advanced air mobility. Research in autonomy and materials fuels both national security and commercial logistics.



Logistics ties everything together. The Port of Virginia, with 3.2 million TEUs, \$1.4 billion in new investments, and the highest on-dock rail share on the East Coast, is a true global gateway. It moves naval supplies, stages offshore wind projects, and ships aerospace and manufacturing exports, in addition to consumer goods. From Hampton Roads, companies can reach 130 million Americans in a single day, giving them a fast break advantage to half the U.S. economy.

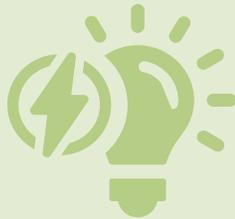
Cross-Cutting Growth Drivers

Each DEAL sector is supported by four cross-cutting growth drivers:

- **Workforce:** Hampton Roads commands an 895,000-strong labor force, refreshed annually by 15,000 service members, 8,000 of whom stay local.
- **Innovation & Technology:** Federal labs and universities drive breakthroughs in AI, autonomy, and advanced manufacturing, with hundreds of millions annually in related R&D.
- **Sites & Infrastructure:** 17 waterfront parcels and bundled industrial clusters provide shovel-ready capacity for clean power manufacturing, submarine supply, and aerospace integration.
- **Supply Chain:** Hampton Roads' defense and logistics hubs support more than 2,000 suppliers, though only a fraction are based in Virginia, leaving room for growth.



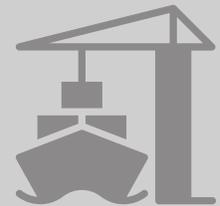
DEFENSE



ENERGY



AEROSPACE



LOGISTICS

Workforce

Innovation & Technology

Sites & Infrastructure

Supply Chain

TRANSFORMATIVE PROJECTS



To bring the Playbook to life, the Alliance and its partners are advancing eight flagship projects—each directly aligned with DEAL sectors and cross-cutting drivers.

AUKUS Center of Excellence

What: A series of subnational hubs in Hampton Roads (located at William & Mary's Whole of Government Center of Excellence), South Yorkshire, and Adelaide that collaborate on submarine industrial base innovation.

Why: AUKUS demands expanded submarine production capacity, new suppliers, and advanced tech integration. Hampton Roads is the only U.S. region positioned to scale.

Impact: \$500M–\$1B investment, 2,000–4,000 jobs, expanded supplier base, and accelerated technology adoption.

Leader: Kathryn H. Floyd, Director, Whole of Government Center of Excellence, William & Mary

Secure Energy Future Center (SEFC)

What: An innovation hub for next-generation energy solutions, leveraging the Virginia Tech Corporate Research Center to solve complex problems and enable strategic regional growth.

Why: SEFC aims to transform strategic coastal advantages into a highly effective market-driven platform for accelerating energy innovation into commercial solutions to help build a secure energy future.

Impact: Position Hampton Roads as a living laboratory for energy innovation and establish a pipeline of investable ideas that can bring tangible economic impact to Hampton Roads.

Leader: Chelsea Olivieri, Managing Director, VTCRC @ Tech Center Research Park

NEXUS: National Excellence in Uncrewed Systems

What: An innovation hub to accelerate autonomous systems across domains—air, land, sea, and space—through testing, commercialization, workforce training, and industry engagement.

Why: The global autonomous systems market is on a trajectory for exponential growth. Hampton Roads' air, sea, and space assets make it an ideal testbed.

Impact: 2,500–4,000 indirect jobs, national recognition, expanded entrepreneurship and manufacturing.

Leader: Nancy Grden, President & CEO, Hampton Roads Executive Roundtable

Hampton Roads Maritime Training System (HRMTS)

What: Led by the Hampton Roads Workforce Council, HRMTS is focused on developing a qualified workforce for the Hampton Roads maritime industry.

Why: HRMTS plays a vital role in preparing a qualified workforce to support the demands of the maritime industry and the demands of the U.S. Navy's submarine fleet transformation.

Impact: HRMTS is designed to train more than 5,000 workers annually in critical skills such as welding.

Leader: Shawn Avery, President & CEO, Hampton Roads Workforce Council

Defense Efficiency & Production Center

What: A public-private center to address key challenges facing the U.S. maritime industrial base, such as production delays, workforce shortages, and a shrinking supplier network.

Why: Given growing global tensions and rising militarization, this center will serve as a critical engine for accelerating maritime production and innovation.

Impact: The Center will anchor a dynamic ecosystem that positions Hampton Roads as the premier hub for undersea defense innovation.

Leader: Douglas L. Smith, President & CEO, Hampton Roads Alliance

Elizabeth River Eastern Branch Dredging

What: Led by the Virginia Maritime Association, this project focuses on dredging the eastern branch of the Elizabeth River to ensure maritime readiness.

Why: Would provide the U.S. Navy immediate access to additional certified dry docks, which ultimately produces enormous fleet readiness gains, competitive cost savings, and helps meet the force-level goals of the U.S. Navy.

Impact: This modest investment will provide a return on investment of hundreds of millions of dollars in critical Navy readiness and a 40% increase in NAVSEA certified dry docks.

Leader: David White, Executive Director, Virginia Maritime Association

757 Collab Defense Technology Accelerator

What: In partnership with NavalX Mid-Atlantic Tech Bridge, the Defense Technology Accelerator (DTA) propels early-stage companies to scale breakthrough technologies for the Navy and Marine Corps.

Why: DTA is designed to propel high potential startups in critical technologies into the DoD contracting space and equip them with the tools to bring cutting-edge solutions to the warfighter faster.

Impact: By supporting innovation in critical technologies, DTA can shape the future of national defense.

Leader: Paul Nolde, President & CEO, 757 Collab

Hampton Roads Ambassador Corps

What: A council of retired executives (CORE) including former high-ranking military officials, leveraging their networks through coordinated outreach, trade missions, and peer engagement to benefit regional growth efforts.

Why: Business attraction today requires relationships and credibility, not just incentives.

Impact: The Council of Retired Executives (CORE) aims to secure 3–5 major business wins annually through deeper national and international reach, leveraging relationships and credibility

Leader: Rear Admiral (ret.) Charles “Chip” Rock, Hampton Roads Alliance

Project Governance

A project cannot be successful without a defined mission, capital source, and team. While each project lead will select their team, they will join an overarching steering committee to review progress and evaluate future projects. That committee will include:

- Co-Chairs: Doug Smith (Hampton Roads Alliance) and Shawn Avery (Hampton Roads Workforce Council)
- Nancy Grden (GO Virginia)
- Bryan Stephens and Bob McKenna (Regional Organizations Presidents Council (ROPC) Co-Chairs)
- Leaders from the Virginia Economic Development Partnership (VEDP)
- Leaders from each of the eight projects

Creating Additional Projects

The Playbook framework is replicable. Any project supporting one or more DEAL sectors while advancing workforce, innovation, infrastructure, or supply chain can be developed using a four-step process:



Supports the Hampton Roads Economy

Falls within the DEAL Framework or proposes another growth driver



Has a Regional Sponsor and Set of Participants

Regional group and proposed committee members from stakeholder organizations



Includes Strategic Performance Indicators

Has a defined timeline and set of metrics that will be used to measure success



Has a Defined Capital Stack

Includes an established sponsor with plans to provide needed resources



LOOKING AHEAD: NEXT STEPS



THE GAME PLAN

The Strategy

Hampton Roads will compete and win in the new economic order by focusing on Defense, Energy, Aerospace, and Logistics (DEAL) and advancing transformative projects that grow our workforce, strengthen infrastructure, and secure long-term investment.

How We Play

DEAL is not just what we focus on, it is how we execute. Every project follows the same play:

1. **Define:** Pinpoint the biggest opportunities and barriers.
2. **Develop:** Build projects and strategies that leverage our strengths.
3. **Deploy:** Put funding, partners, and resources onto the field.
4. **Deliver:** Execute the plays and keep score.

Plays on the Field

Eight transformative projects are the first set of plays in the Playbook and demonstrate how DEAL moves from strategy to action.

- **Defense/Aerospace:** AUKUS Center, Defense Efficiency & Production Center, 757 Collab Defense Tech Accelerator, NEXUS, HRMTS, CORE
- **Energy/Innovation:** Secure Energy Future Center
- **Logistics/Infrastructure:** Elizabeth River Dredging

Each ties directly to DEAL sectors and is powered by Workforce, Innovation, Infrastructure, and Supply Chain.

How We Win

Winning requires a team effort, and every city/county, company, college, and citizen has a role in execution. From architects shaping our skyline to builders crafting new office parks, to our attorneys, architects, bankers, and small businesses, every project in Hampton Roads contributes to the Playbook's success. Local governments align policy, businesses and investors bring capital and innovation, universities and training providers grow the workforce, and civic partners connect projects to communities. When it comes to regional growth, we win when we are running the same plays.

Together, we will measure our success by:

- Jobs and capital investment created and retained
- Private and federal investment
- Workers trained and credentialed
- Sites and infrastructure ready for growth
- Regional economic growth vs. national peers

The Playbook gives Hampton Roads a shared strategy for growth. With DEAL as our foundation, transformative projects on the horizon, and a clear scoreboard to track results, Hampton Roads will not only stay in the game, we will lead it.



FUTURE CONSIDERATIONS

The Hampton Roads Playbook establishes a strong foundation built around the region's core strengths in Defense, Energy, Aerospace, and Logistics (DEAL); however, the work does not end here. Like any competitive strategy, success depends on our ability to adapt, fill gaps, and expand into complementary areas that strengthen the overall system. The following topics represent strategic opportunities and areas where targeted collaboration and disciplined project development could produce the next generation of transformative initiatives. Each can be advanced through the Define, Develop, Deploy, Deliver framework that guides current projects.

Coastal Resilience & Blue Technology

Hampton Roads' geography is both its greatest strength and its most persistent challenge. The region's coastal position underpins its global leadership in trade, defense, and shipbuilding, but it also requires proactive strategies to address sea level rise, recurrent flooding, and shoreline change that can disrupt waterfront operations, logistics, and long-term investment confidence.

OPPORTUNITY: Hampton Roads is uniquely positioned to lead in coastal resilience, blue technology, and maritime engineering. These are areas that directly support national defense, energy infrastructure, and port readiness. A coordinated approach that aligns universities, the Virginia Institute of Marine Science (VIMS), federal agencies, and private industry could transform these challenges into an economic advantage. By developing and exporting solutions in flood mitigation, coastal modeling, and maritime innovation, Hampton Roads can reinforce its position as a secure, adaptive, and globally connected coastal economy.

Digital Infrastructure & Cybersecurity

As global commerce becomes increasingly digital, regions that can offer secure, reliable, and scalable data infrastructure will hold a decisive economic advantage. Hampton Roads already possesses unique assets, such as transatlantic subsea cables, proximity to federal and defense installations, and a growing network of technology firms, that position it to play a significant role in the next wave of digital investment.

OPPORTUNITY: The region has an opportunity to shape its approach to digital infrastructure proactively, ensuring that new data centers, fiber networks, and cyber assets strengthen the economy without placing undue strain on energy or land resources. Developing uniform regional frameworks for zoning, taxation, and infrastructure planning can help ensure that digital growth is both competitive and coordinated. Coupled with continued investment in cybersecurity and workforce readiness, Hampton Roads can position itself as a secure, globally connected digital gateway that supports the region's defense, energy, logistics, and innovation ecosystems while setting a national standard for responsible data infrastructure development.

Healthcare & Biosciences

Healthcare is one of Hampton Roads' largest and most essential sectors, shaping workforce readiness, veteran care, and overall quality of life. The region's health systems are deeply interconnected with its economic future, yet Hampton Roads still lacks a large-scale, research-intensive university hospital system, which is an anchor that drives clinical research, innovation, and commercialization in peer regions.

OPPORTUNITY: The merger between Old Dominion University and Eastern Virginia Medical School (EVMS) creates the foundation for a stronger academic health system that can expand clinical research capacity, attract talent, and deepen partnerships across the biosciences sector. At the same time, leading health systems such as Sentara Health, Riverside Health System, and Children's Hospital of The King's Daughters (CHKD) remain critical voices in this conversation, bringing operational expertise, clinical excellence, and regional reach that will shape the evolution of Hampton Roads' healthcare and innovation network. Together, this growing alignment between higher education and major healthcare providers represents a unique opportunity to strengthen the region's position in health innovation, dual-use applications, and the broader economic competitiveness of Hampton Roads.

Housing Availability & Affordability

Housing is now one of the most important determinants of economic competitiveness. For Hampton Roads, a constrained housing supply, especially near major employment corridors and installations, limits labor mobility and inflates costs for both households and employers.

OPPORTUNITY: By viewing housing as economic development infrastructure, regional leaders can align land-use planning, permitting, and financing tools to expand attainable housing near key job centers. Coordinated action across jurisdictions can ensure that housing growth keeps pace with employment growth, strengthening the region's labor pipeline and quality of life.

Innovation Commercialization & Capital Access

The Playbook highlights research anchors such as NASA Langley and Jefferson Lab but stops short of detailing how discoveries move from lab to market. Without dedicated early-stage capital and commercialization infrastructure, first customer opportunities, and technologies born in Hampton Roads risk scaling elsewhere.

OPPORTUNITY: Strengthening the region's innovation ecosystem through coordinated tech transfer, seed funding, and industry partnerships could accelerate commercialization in dual-use, energy, and advanced manufacturing fields. Building stronger linkages between federal labs, universities, entrepreneurship programs, and private capital would allow Hampton Roads to retain and scale its own innovation. Expanding access to venture capital, whether through regional funds, angel networks, or partnerships with national investors, represents a potential next step in building the ecosystem required to turn research and prototypes into companies, jobs, and long-term economic growth.

Public Transportation & Regional Mobility

DEAL industries depend on the efficient movement of both goods and people. While the Playbook emphasizes freight and logistics infrastructure, regional mobility for workers remains fragmented. Limited transit connectivity between bases, industrial parks, and training hubs constrains access to opportunity and labor force participation.

OPPORTUNITY: Expanding multimodal connectivity and using new mobility applications, particularly along DEAL corridors, could enhance workforce access, improve reliability for shift work, and strengthen integration across local economies. Viewing mobility as a shared asset for employers and educators, not just a public service, would align investment with economic outcomes.

Regional Branding & Tourism

Tourism is one of the region's largest and most visible industries, yet it remains absent from the Playbook's initial project slate. Beyond its economic impact, tourism is a brand amplifier, and it shapes how residents, visitors, and investors perceive Hampton Roads. Tourism and quality of life also influence a region's retention and attraction of talent.

OPPORTUNITY: A more cohesive regional tourism and marketing strategy could better connect Hampton Roads' historic origins in Jamestown and Williamsburg, its maritime and military heritage, and its modern coastal lifestyle. By promoting the region as a unified destination with shared assets and experiences, Hampton Roads can strengthen visitor demand, support air service and hospitality growth, enhance its overall attractiveness to both tourists and talent and communicate the regional innovation emphasized in the Playbook.

Moving Forward

These considerations can be our next plays. By applying the same disciplined DEAL framework, Hampton Roads can continue to evolve from regional strength to national leadership, ensuring every new project advances the same goal of building a more resilient, connected, and competitive coastal economy.



Playbook Portal

HamptonRoadsPlaybook.com is home to additional tools, data, and materials you can use to get in the game.

REGIONAL ASSET MAP

How do you showcase a constellation of innovation? The Alliance has created the first ever regional asset viewer to bring a bird's-eye view of everything that makes Hampton Roads an ideal place for business onto one map. Log on and explore the region.

THE UNABRIDGED HAMPTON ROADS PLAYBOOK

This document serves as the Executive Summary of the Hampton Roads Playbook. Visit the website for an unabridged Hampton Roads Playbook with a deep dive into the DEAL Framework and what makes Hampton Roads unique.

SOURCE DATA AND WHITE PAPERS FROM BRUCE KATZ & PROJECT LEADERS

Find white papers detailing each project and video interviews with the project leads explaining their project's background and what results you can expect.



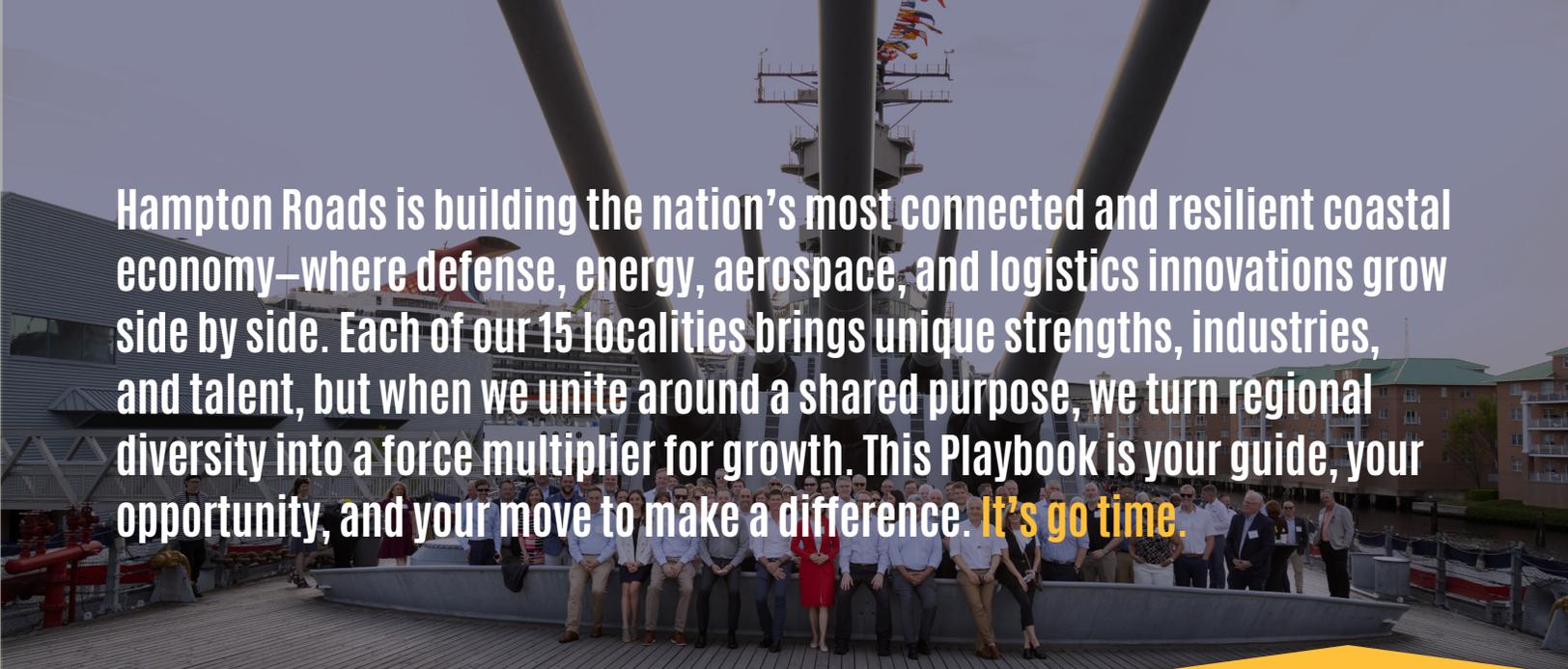
Conclusion

The Hampton Roads Playbook is both a strategy and a **call to action**. By focusing on Defense, Energy, Aerospace, and Logistics—the DEAL Framework—and advancing flagship projects like AUKUS, HRMTS, NEXUS, and the Defense Efficiency & Production Center, Hampton Roads is organizing for growth at scale.

Our region has long been America's frontline for defense, energy, and global trade. Today, it is poised to be the proving ground for the next economy. Hampton Roads offers not just isolated advantages, but an integrated growth platform—where dual-use innovation, global logistics, and federal capital converge. For enterprises seeking resilience, scale, and opportunity in the new economic order, Hampton Roads is the place where ambitions in defense, energy, aerospace, and logistics converge—and accelerate.



Hampton Roads is building the nation's most connected and resilient coastal economy—where defense, energy, aerospace, and logistics innovations grow side by side. Each of our 15 localities brings unique strengths, industries, and talent, but when we unite around a shared purpose, we turn regional diversity into a force multiplier for growth. This Playbook is your guide, your opportunity, and your move to make a difference. **It's go time.**



ABOUT THE ALLIANCE

The Hampton Roads Alliance (the Alliance) is the leading regional economic development organization for the Hampton Roads region of Virginia. It is a nonprofit, public-private partnership supported and led by the region's most influential business leaders, local governments, and top academic institutions. The Alliance is proud to represent 15 localities that, with the support of more than 100 private sector investors, govern and resource the organization and its regional economic development efforts. Those efforts focus on the following service areas: business attraction, business expansion, and business intelligence.

Learn more at www.HamptonRoadsAlliance.com.



Acknowledgments

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